

**DOCUMENTS WITH THE CLERK'S OFFICE
BY THE END OF TUESDAY, 10/17/06.
SECOND CHECK WILL BE POSTED
ON WEDNESDAY, 10/18/06.
**LATE-FILED SUPPLEMENTS WILL
LIKELY RESULT IN THE CONTINUANCE
OF YOUR CASE****

The Probate Examiners can be reached at ProbateNotes@courts.sbcounty.gov. Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate examiners can only respond to inquiries regarding the meaning of comments in the notes. **Please do not send emails to state that documents have been filed, to request a confirmation of whether documents have been received, or to request the clearing of notes.** No legal or procedural advice may be given.

Superior Court of Calif, County of San Bernardino

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CIVCAL4

Joshua Tree District

PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06

TIME: 9:00

DEPT: E1

CASE #: MPRMS01616

CONTINUE TO 11/14/06 – SET IN ERROR

CASE NAME: ESTATE OF MERLE RAYMOND PRUYNE

HEARING:

Petition for Probate, Letters of Tstmntry with full authority
under IAEA.

COUNSEL:

ANTHONY DEFRANCE (PET)...ELIZABETH BAKER

MERLE RAYMOND PRUYNE (DEC)...

JO DEE POWERS (OBJ)...ANNIE

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07244

CASE NAME: ESTATE OF RUTH E ARMAGOST

HEARING:
PETITION FOR LETTERS OF ADMINISTRATION W/WA W/FULL AUTHORITY
UNDER IAEA.

COUNSEL:
JODIE D CASEY (PET)...WALTER T. MOORE
RUTH E ARMAGOST (DEC)...

GENERAL INFORMATION:
Special administration was granted on 9/14/06

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration, full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests bond be waived as sole asset consists of real property. However, as full authority is requested bond should be fixed at \$119,000. Alternatively, court could grant limited authority. Judge to decide.
2. Need to file proof of publication.

RECOMMENDATION:
RFA subject to note 2 and court's determination of bond. If approved, court to set future dates. Set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07246

CASE NAME: MTR OF HARVEY ADELBERT SAMPSON

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

HARVEY E SAMPSON (PET)...ROBERT G MCCOY JR
HARVEY ADELBERT SAMPSON (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests bond be fixed at \$455,000. Appears ok.
2. Need to file notice of petition to administer estate and proof of service.
3. Need to file proof of publication.

RECOMMENDATION:

Need to clear notes 2 & 3. If approved, court to set future dates. Set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07247

CASE NAME: ESTATE OF SUSIE VELASQUEZ

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

ALFRED VELASQUEZ (PET)...PRO/PER
SUSIE VELASQUEZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration, full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. All heirs waive bond. Estimated value of estate is real property only of \$350,000 and petitioner is a California resident. JTD
2. Need to file notice of petition to administer estate.
3. Need to file proof of publication.

RECOMMENDATION:

Need to clear notes 2 & 3, no bond. If approved, court to set future dates. Set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07248

CASE NAME: MTR OF BABETTE B LEVY

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

PAUL ARTHUR LEVY (PET)...FULLERTON LEMANN SCHAEFFER & D
BABETTE LEVY (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. All heirs have waived bond. Estimated value of estate is personal property of \$500 and real property of \$320,000. Petitioner is a non-resident. Court has discretion to require bond as petitioner is a non-resident. Pr.C. §8571. Court may wish to require minimum bond of \$20,000. JTD
2. Need to file proof of publication.

RECOMMENDATION:

Need to clear note 2 and court's determination of bond. If approved, court to set future dates. Set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07249

CASE NAME: MTR OF WILLARD H BECK JR

HEARING:
Spousal Property Petition hearing.

COUNSEL:
DOLORES BECK (PET)...PRO/PER
WILLARD H BECK JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Spousal Property Petition

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests determination of property passing to her as the surviving spouse. Specifically, decedent's 1/25th ownership interest in real property at 3536 Stoddard, San Bernardino. Petitioner does not provide any allegation as to how the interest in real property is the community property of petitioner and decedent. How long was petitioner married to decedent? Was the property acquired during marriage? Need copy of deed to real property. File verified supplement.
2. Need to file notice of hearing and proof of service.
3. Related matters (matter 7 & 8)

RECOMMENDATION: Need to clear notes.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07250

CASE NAME: MTR OF BLANCHE H BECK

SEE ALSO #8

HEARING:
Petition to determine succession to Real Property

COUNSEL:
MARION J BECK (PET)...PRO/PER
BLANCHE H BECK (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition to determine succession to real property
(estates \$100,000 or less)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioners claim an ownership interest to decedent's real property at 3536 Stoddard, San Bernardino. Petitioner state the claim to ownership interest is set forth on Attachment 13. However, no attachment is affixed to the petition. File verified supplement.
2. A petition to waive appraisal by probate referee is also before the court (matter 8)
3. Related matter 6.

RECOMMENDATION:
Need verified supplement.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07250

CASE NAME: MTR OF BLANCHE H BECK

SEE ALSO #7

HEARING:
Petition for FOR WAIVER OF APPRAISAL BY PROBATE REFEREE

COUNSEL:
MARION J BECK (PET)...PRO/PER
BLANCHE H BECK (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Waiver of Appraisal by probate referee

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service on probate referee.
2. Petitioners allege the date of death value of the real property is not known. Decedent died 1/24/1983. Petitioners estimate the decedent's 1/5 ownership interest in the property to be worth approximately \$65,000. Petitioners intend to sell the real property.
3. Related matters 6 & 7.

RECOMMENDATION:
Need to clear notes.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07251

CASE NAME: ESTATE OF DORA AMELIA RUIZ

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

RAY MOLLINADO (PET)...VARNER & BRANDT
DORA AMELIA RUIZ (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate and for Letters Testamentary
with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. All heirs have waived bond. Estimated value of estate is personal property of \$10,000 and real property of \$230,000. Petitioner is a non-resident and court has discretion to require bond of a non-resident per Pr.C. §8571. Court may wish to require minimum bond of \$20,000. JTD
2. Need to file notice of petition to administer estate and proof of service.
3. Need to file proof of publication.

RECOMMENDATION:

Need to clear notes 2 & 3 and court's determination of bond. If approved, court to set future dates. Set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07252

CASE NAME: ESTATE OF LEONARD GUNN

HEARING:

Petition for Probate, Letters of Tstmnty with full authority
under IAEA.

COUNSEL:

DARRELL S GUNN	(PET)...GEORGE S THEIOS
LEONARD GUNN	(DEC)...
MARK L GUNN	(TP)...PRO/PER

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Probate and for Letters Testamentary
with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Will waives bond.
2. Need to file proof of publication.

RECOMMENDATION:

RFA subject to note 2. If approved, court to set future dates. Set hearing on filing
inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed
30 days in advance.

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San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07254

CASE NAME: MTR OF AMENDED & RESTATED BRAUER FAMILY TRUST

HEARING:

Petition for FOR ORDER CONFIRMING TITLE OF REAL PROPERTY IN
LIVING TRUST

COUNSEL:

MARY BELLE BRAUER (PET)...MIRAU, EDWARDS, CANNON & LEWIS

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Order Confirming Title of Real
Property in Living Trust

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Petitioner is one of the original settlor/trustees of the Amended & Restated Brauer Family Trust dated 6/16/93. The other settlor/trustee (Floyd Brauer) died on 12/22/05. Petitioner and Floyd Brauer were husband and wife. Petitioner alleges that petitioner and decedent held various interests in real property/condominiums in San Bernardino County, Mono County, Riverside County and San Luis Obispo County at the time the Trust was created, however, quitclaim deeds were never prepared transferring record title to the Trust. Petitioner further alleges that it was the intent of the settlors to include the various interests in real properties into the Trust pursuant to the written Trust Ownership of Assets and Declaration of Community Property Status dated 6/16/93. Petitioner now requests the court to determine the ownership interest of the real properties in the name of the Amended & Restated Brauer Family Trust pursuant to Estate of Heggstad (1993) 16 Cal. Appl. 4th 943.

RECOMMENDATION: Need notice and then recommended for approval, absent objections.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:00 DEPT: E1

CASE #: SPRSS07256

CASE NAME: ESTATE OF FRANK E ISOM

HEARING:

Petition for Letters of Admin. W/ Full Authority under IAEA.

	COUNSEL:
TIMOTHY ISOM	(PET)...HORSPOOL & PARKER
FRANK E ISOM	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests bond be fixed at \$165,000. Appears adequate.
2. Need to file notice of petition to administer estate and proof of service.
3. Need to file proof of publication.

RECOMMENDATION:

RFA subject to notes 2 & 3 and require bond of \$165,000. If approved, set hearing on filing inventory for 6/11/07. Set hearing on accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS04997

CASE NAME: EST OF GLENN PAUL BULLOCK

HEARING:

SECOND Account and Report of CHARISSA L BULLOCK and Petition for
allowance of fees filed.

COUNSEL:

CHARISSA L BULLOCK (PET)...RONALD W ASK
GLENN PAUL BULLOCK (DEC)...
PATRICIA L LAYNG (TP)...PRO/PER
BOND SERVICES OF CALIFORNIA (PRO/PER)...PRO/PER
RONALD ASK (RONALD W ASK)...RONALD W

No file available for review.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS05645

CASE NAME: EST OF REBECCA A SANTANA (MASTER FILE)

HEARING:

FIRST AND FINAL Account and Report of LAWRENCE A DEAN II and
Petition for allowance of fees filed.

COUNSEL:

PABLO PEREZ SANTANA (PET)...ELDER LAW CENTER, P.C.
REBECCA A SANTANA (DEC)...
LAWRENCE A DEAN II (SA)...SHERRI L KASTILAHN
PABLO PEREZ SANTANA (PET)...ELDER LAW CENTER, P.C.
DELMAR J RAMIREZ (OBJ)...JAMES B CHURCH
VALERIE CARILLO (SKORETZ & CHURCH)...SKORETZ &
MICHAEL TOWNSEND (FULLERTON LEMANN SCHAEFER &
DO)...FULLERTON
VALERIE CARRILLO ()...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Account and Report and Petition for
Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Petitioner alleges that the creditor's claim filed by Chase Bank was rejected in part. The allowance/rejection was served upon the creditor on or about 6/28/06. The creditor has 90 days to file an action on the claim which would have expired on 9/26/06. The 1st & Final Account/Report was filed on 9/12/06. Need verified supplement as to whether petitioner has received a notice from the creditor re any action on the rejected part of the claim.
3. Statutory compensation and fees are \$8,503.33. Ok. However, petitioner alleges per settlement agreement that petitioner and counsel have each

received ½ of their statutory fees upon the close of escrow. This payment was improper without a prior court order. However, question if each now have a balance due and owing in the amount of \$4,251.67? File verified supplement.

4. Petitioner requests extraordinary fees of \$4,392.65 for services relating the litigation of a civil action filed against petitioner relating to the settlement of a claim, sale of real property, eviction process, compromise of a creditor's claim and preparation of an 850 petition. Billed at various rates for various services not exceeding \$85/hour. Itemized. It appears the following services were statutory in nature:
 - (a) 1/12/05 – Asset research billed at \$59.50
 - (b) 1/21/05 - Norton Credit Union re statement request/credit card statements billed at \$17.00
 - (c) 1/28/05 – Correspondent review from Norton Credit Union billed at \$25.50
 - (d) 7/1/05 – distribution of personal property from residence to family billed at \$850.00

Need verified supplement as to why above are extraordinary in nature. Alternatively, court may wish to reduce extraordinary fee request by \$952.00 or allow \$3,440.65.

5. Attorney requests extraordinary fees of \$4,392.65 for services relating the litigation of a civil action filed against petitioner relating to the settlement of a claim, sale of real property, eviction process, compromise of a creditor's claim and preparation of an 850 petition. Itemized. It appears the following services were statutory in nature:
 - (a) 8/9/04 – re bills owed on house utilities billed at \$50.00
 - (b) 12/28/04 – review & revise inventory for filing billed at \$50.00
 - (c) 4/6/05 – draft correspondence to creditor NCO billed at \$210.00
 - (d) 6/14/05 – t/c call from NCO re claim billed at \$42.00
 - (e) 1/12/06 – t/c Ben Bidart's office re outstanding bill for original inventory billed at \$21.00
 - (f) 6/6/06 draft correspondence to NCO re late filed claimant billed at \$157.50
 - (g) t/c from NCO re claim billed at \$52.50

Need verified supplement as to why above are extraordinary in nature. Alternatively, Court may wish to reduce extraordinary fee request by \$583.00 or allow \$3,809.65.

6. Petitioner/attorney allege a claim was settled with NCO Financial per itemized services above, but do not see where claim was paid. Is there an outstanding claim due to NCO Financial? File verified supplement.
7. Copy of bank statement is filed to support balance of cash on hand, however, need reconciliation as balance of bank statement does not match balance on schedule of assets on hand. File verified supplement.

RECOMMENDATION:

Need to clear notes.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06013

CASE NAME: REYNA HERNANDEZ SPECIAL NEEDS TRUST

HEARING:

2ND CURRENT Account and Report of PFF BANK & TRUST and Petition
for allowance of fees filed.

COUNSEL:

PFF BANK & TRUST (TEE)...ELIZABETH MCDONOUGH

GENERAL INFORMATION:

Accounting covers period: 6/1/04 – 5/31/06

THIS CASE IS SET FOR HEARING ON 2nd Account Current and Petition for Fees and
request for Instructions

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Pursuant to the terms of the special needs trust, petitioner as trustee has received the sum of \$21,140.58 as trustee's fees. Petitioner requests confirmation of such payment for such services. JTD
3. Petitioner has paid to IBAR Settlement Co., a member of the Trust Advisory Committee the sum of \$20,640.58 pursuant to the terms of the special needs trust.
4. Attorney requests fees of \$2,350.00, of which \$1,700 has been paid (by inadvertence), leaving a balance due of \$650. Billed at \$235/hour for 10 hours. Itemized. JTD
5. Petitioner requests instructions on the following issues:
 - (a) Water bill. Petitioner advises that the water company (Eastern Muni Water District) called IBAR to report that the beneficiary's mother was not paying the water bill and that the family allegedly twice broke the tags to illegally restore water services. These actions resulted in \$680 in penalties, in addition to the \$2,200 water bill. Petitioner decided that it

was in the best interest of the trust beneficiary to pay the water bill, but petitioner proposes to deduct these charges from the mother/caretaker's salary. JTD

- (b) Minors residing in home. Petitioner received an email from IBAR indicating that the beneficiary's mother was abusing substances and that 3 of the minor children living in the home had not been enrolled in school for the past 8 months. Petitioner called CPA, but to date, no information from CPS has been given in response. Petitioner requests that the court appoint a lawyer to investigate and report back to the court to ensure that the beneficiary is living in good surroundings. JTD
- (c) Automobile repairs. Petitioner alleges the beneficiary's mother faxed to IBAR an estimate for automobile repairs totaling \$12,776.36 as a result of an accident. Mother holds title for the vehicle but the trust bought the vehicle for the beneficiary's transportation. Apparently, beneficiary's mother let the insurance lapse 3 days before the accident. Petitioner requests authorization to pay the repair bill. JTD

RECOMMENDATION:

Need notice and court's determination of instruction on payment requests (note 5). If approved, set next accounting period for 11/20/08

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06517

CASE NAME: MTR OF BETTY MAE BERTGES

HEARING:

1ST & FIN Account and Report of RUTH ANN BERTGES and Petition
for allowance of fees filed.

COUNSEL:

RUTH ANN BERTGES (PET)...PRO/PER
BETTY MAE BERTGES (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Account and Petition for Final
Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service
2. Summary of account is out of balance (page 2 paragraph I). Need verified supplement.
3. Petitioner waives statutory compensation.
4. No prayer is set forth in the petition. Need verified supplement.

RECOMMENDATION:

Need to clear notes.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06618

CASE NAME: MTTR GUADALUPE ALVAREZ

HEARING:

1st & final Account and Report of WELLS FARGO BANK, INC and
Petition for allowance of fees filed.

COUNSEL:

WELLS FARGO BANK, INC (PET)...RORY W CLARK
GUADALUPE ALVAREZ (DEC)...
GUADALUPE ALVEREZ,JR (ADM)...PRO/PER

GENERAL INFORMATION:

On 6/9/06, the court appointed Guadalupe Alvarez, Jr., as successor administrator.

THIS CASE IS SET FOR HEARING ON 1st & Final Account (filed by former administrator Wells Fargo Bank) and petition for discharge of Wells Fargo Bank as personal representative

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Only real property is subject of accounting.

RECOMMENDATION:

RFA subject to note 1. Once approved, set hearing for filing of receipts and final discharge (as to Wells Fargo Bank only) for 11/1/07.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06622

CASE NAME: MTR OF NORDA A BYERS

HEARING:

FIRST AND FINAL Account and Report of SALLY CLOVER and Petition
for allowance of fees filed.

COUNSEL:

SALLY CLOVER	(PET)...WILLIAM G SULLIVAN
NORDA A BYERS	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Account and Petition for Final
Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. All residual heirs have waived an accounting
2. Petitioner waives statutory compensation.
3. Attorney requests statutory fees of \$8,547.58. Ok.

RECOMMENDATION:

RFA. Once approved, set hearing for filing of receipts and final discharge for 11/1/07.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06806

CASE NAME: ESTATE OF ANABELLA LOZANO

HEARING:

FIRST AND FINAL Account and Report of CHRISTINA ERICKSON-TAUBE
and Petition for allowance of fees filed.

COUNSEL:

CHRISTINA ERICKSON-TAUBE (PET)...KARIN HORSPOOL
ANABELLA LOZANO (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Account and Petition for Final
Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Statutory compensation/fees are \$7,042.65 each. Ok.
2. Petitioner requests extraordinary fees of \$812.75 for services rendered in connection with the sale of real property with pending foreclosure. Billed at various rates for various services not exceeding \$65/hour. Itemized. JTD
3. Attorney requests extraordinary fees of \$1,491.00 for services rendered in connection with the sale of real property with pending foreclosure. Billed at \$210/hour for 7.1 hours. Itemized. JTD
4. Petitioner requests authority to withhold \$1,000 as a reserve for taxes and unforeseen contingencies. Ok.

RECOMMENDATION:

RFA subject to court's determination of extraordinary fee request. Once approved, set hearing for filing of receipts and final discharge for 11/1/07.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06870

CASE NAME: ESTATE OF DAVE THOMAS JR.

HEARING:

FIRST AND FINAL Account and Report of RICHARD M. HARMON and
Petition for allowance of fees filed.

COUNSEL:

RICHARD M. HARMON (PET)...WILSON, WILSON & PERRIZO
DAVE THOMAS JR (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Final
Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner is sole heir and waives an accounting.
2. Statutory fees are \$9,900, not \$11,900 as set forth in petition. Statutory compensation is calculated correctly on attachment at \$9,900. Ok.
3. Attorney requests extraordinary fees of \$2,000 for services rendered in connection with the sale of real property. Billed at \$250/hour for 10.8 hours. Need to file Estate of Walker (1963) 221 Cal.App.2d 792 declaration to explain why the statutory fee is not a sufficiently reasonable fee to cover all services provided. The court will not generally consider awarding extraordinary fees until the personal rep/counsel establish that all ordinary fees have actually been earned. File verified supplement.

RECOMMENDATION:

Need verified supplement re note 3. If approved, set hearing for filing of receipts and final discharge for 11/1/07

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06918

CASE NAME: ESTATE OF LORNE RAY FRISBIE

HEARING:

Waiver of account and for final distribution.

COUNSEL:

HOWARD E. BENTZ (PET)...PECCORINI & PECCORINI
LORNE RAY FRISBIE (DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Report on Waiver of Account and
Petition for Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner is sole heir and waives an accounting.
2. Statutory fees are \$7,900. Petitioner waives statutory compensation. Ok.

RECOMMENDATION:

RFA. Once approved, set hearing for filing of receipts and final discharge for 11/1/07.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS06975

CASE NAME: EST OF PAMELA SLADE

HEARING:

1ST & FINAL Account and Report of ROBERT SLADE and Petition for allowance of fees filed.

COUNSEL:

ROBERT SLADE	(PET)...WALTON, MITCHELL AND FEIGEL
PAMELA SLADE	(DEC)...

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON 1st & Final Account and Report and Petition for Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner waives statutory compensation.
2. Attorney requests statutory fees of \$10,504.00, however, attorney has agreed to take \$2,485.00 in fees. Ok.
3. Attorney requests reimbursement of costs of \$1,018.35. Itemized. Ok.
4. Need to file graduated filing fee statement per CRC 7.552.

RECOMMENDATION:

RFA subject to note 4. Once approved, set hearing for filing of receipts and final discharge for 11/1/08.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 9:02 DEPT: E1

CASE #: SPRSS07205

CASE NAME: ESTATE OF VIVIAN ENGBLOM-CHRISTENSEN

HEARING:

Motion re: TO BE RELIEVED AS COUNSEL filed by Petitioner
CHRISTIAN CHRISTENSEN

COUNSEL:

CHRISTIAN CHRISTENSEN (PET)...ROBERT G MCCOY JR
VIVIAN ENGBLOM-CHRISTENSEN (DEC)...

No file available for review.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SC SS02722

CASE NAME: MTR OF MABLE MAY WITMAN

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MABLE MAY WITMAN (CEP)...

GENERAL INFORMATION:

This case is set for hearing on Accounting Review

1st Account is due for the period 12/8/04 – 12/7/05

Continued from 2/27/06 & 7/24/06 at request of County Counsel. Nothing new filed.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERWORK ARE
NOTED;

1. Accounting is not filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in
Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SC SS02854

CASE NAME: MTR OF RAYMOND ATKINSON

HEARING:

FIRST Account and Report of PUBLIC GUARDIAN and Petition for allowance of fees filed.

COUNSEL:

PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
RAYMOND ATKINSON (CEP)...E. JOAN NELMS

GENERAL INFORMATION:

Accounting covers period 4/14/05 – 7/24/06

THIS CASE IS SET FOR HEARING ON 1st Account Current

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Public Guardian and attorney request fees of \$452.00 each.

RECOMMENDATION:

RFA subject to court's confirmation of fees. Once approved, set next accounting review for 1/7/08

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS00144

CASE NAME: IN THE MATTER OF GERALD KELLS-MURPHY

HEARING:
Hearing re: FINAL DISCHARGE

COUNSEL:
GERALD KELLS-MURPHY (CEP)...HARTNELL HORSPPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

On 9/5/03, the court denied the petition for permanent conservatorship and relieved PG as temporary conservator upon the filing of an appropriate accounting

THIS CASE IS SET FOR HEARING ON Final Discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to submit final discharge declaration/order

RECOMMENDATION:

Find out status.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS01354

CASE NAME: IN THE MATTER OF JOYCE MAYFIELD

HEARING:
Accounting Review

COUNSEL:
JOYCE MAYFIELD (CPE)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

5th Account/Waiver of Account is due

Continued from 7/10/06 at request of Counsel. Nothing new filed.

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS02262

CASE NAME: MTR OF BRANDON ELLIS

HEARING:
FIRST AND FINAL Account and Report of PUBLIC GUARDIAN and
Petition for allowance of fees filed.

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
BRANDON ELLIS	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION:
Accounting covers period 10/22/04 – 7/28/06
Conservatorship terminated by operation of law.

THIS CASE IS SET FOR HEARING ON 1st & Final Accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;
1. Public Guardian and attorney request fees of \$1.00 each, but each waive
said fee.

RECOMMENDATION:
RFA. No need to set future dates

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS02375

CASE NAME: MTR OF ROBERTA MC DONNELL

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
ROBERTA MC DONNELL (CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION:
3rd Accounting is due

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

Court must send written notice to conservator and attorney of record directing that the account be filed. Set hearing within 60 days. When an accounting is not filed as required the court shall take action as specified in Pr.C. 2620.2

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS02607

CASE NAME: MTR OF FRANCES DEPETRILLO

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
FRANCES DEPETRILLO (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION:
2nd Accounting is due

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

Court must send written notice to conservator and attorney of record directing that the account be filed. Set hearing within 60 days. When an accounting is not filed as required the court shall take action as specified in Pr.C. 2620.2

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS02627

CASE NAME: MTR OF MARY JACKIN

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
MARY JACKIN (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION:
2nd Accounting is due

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS1498

CASE NAME: IN THE MATTER OF ORLANDO FLORES

HEARING:
Accounting Review

COUNSEL:
ORLANDO FLORES (CEP)...
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

This case is set for hearing on Accounting Review
27th Account is due

Continued from 2/27/06 & 7/24/06 at request of County Counsel. Nothing new filed.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERWORK ARE
NOTED;

1. Accounting is not filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in
Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS5916

CASE NAME: IN THE MATTER OF KATHERINE EVANS

HEARING:
Accounting Review

COUNSEL:
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL
KATHERINE EVANS (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION:
7th Account/Waiver of Account is due
Continued from 7/10/06 at request of counsel

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;
1. Accounting is not filed.

RECOMMENDATION:
When an accounting is not filed as required, the court shall take action as specified in
Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS8009

CASE NAME: IN THE MATTER OF CRUZ PIENO

HEARING:
Accounting Review

COUNSEL:
CRUZ PIENO (CEP)...HARTNELL HORSPOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:

3rd Account is due

Continued from 7/24/06at request of counsel. Nothing new filed

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:00 DEPT: E1

CASE #: SLCSS9401

CASE NAME: IN THE MATTER OF LAURA VANZILE

HEARING:
Accounting Review

COUNSEL:
LAURA VANZILE (CEP)...HARTNELL HORSPPOOL & FOX
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION:
7th Accounting is due

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Accounting is not filed.

RECOMMENDATION:

Court must send written notice to conservator and attorney of record directing that the account be filed. Set hearing within 60 days. When an accounting is not filed as required the court shall take action as specified in Pr.C. 2620.2

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:30 DEPT: E1

CASE #: SC SS03174

CASE NAME: MTR OF CARL M YOUNG III

HEARING:
Petition for Appointment of Conservator

	COUNSEL:
SOFIA S AUGUST	(CP)...PRO/PER
CARL M YOUNG JR	(CP)...PRO/PER
CARL M YOUNG III	(CTP)...LENITA A SKORETZ

No file available for review.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:30 DEPT: E1

CASE #: SC SS03175

CASE NAME: MTR OF ERNEST BROWN JR

HEARING:
Petition for Appointment of Conservator

COUNSEL:
SAMUEL MARTIN JR (CPE)...PRO/PER
ERNEST BROWN JR (CEP)...EDWARD B FISCHER

No file available for review.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:30 DEPT: E1

CASE #: SC SS03176

CASE NAME: MTR OF JAMES ARTHUR GLEN

HEARING:
Petition for Appointment of Conservator

COUNSEL:
TERRY GLEN (CPE)...PRO/PER
JAMES ARTHUR GLEN (CEP)...MELVIN L FRIEDLAND

No file available for review.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:30 DEPT: E1

CASE #: SC SS9087

CASE NAME: IN THE MTR OF RICHARD MOYER

HEARING:
Petition for FOR TERMINATION OF LIMITED CONSERVATORSHIP OF THE
PERSON

COUNSEL:
RICHARD MOYER (PLA)...

GENERAL INFORMATION:
Conservatee died on 7/27/06

THIS CASE IS SET FOR HEARING ON Petition for Termination of Limited
Conservatorship of the person

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;
1. Petitioner was appointed limited conservator of the person on 3/29/91, but
no letters of conservatorship were issued due to inadvertence.

RECOMMENDATION:
RFA. No need to set future dates.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02497

CASE NAME: MTR OF PATRICIA K. DARNALL

HEARING:
SECOND REPORT OF CONSERVATOR WITH WAIVER OF Account and Report
of DONNA DARNALL

COUNSEL:
DONNA DARNALL (CPE)...HARTNELL HORSPOOL & FOX
PATRICIA K. DARNALL (CEP)...
PATRICIA K DARNELL (PLA)...KARIN HORSPOOL
ALOFA TAUFU (DEF)...

GENERAL INFORMATION:
Report covers period 12/31/04 – 12/31/05

THIS CASE IS SET FOR HEARING ON 2nd Report on Waiver of Account and Petition for
its Settlement

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Petitioner alleges that the conservatorship estate falls within the requirements of Pr.C. §2628 (small estate) and thus, an accounting can be waived.

RECOMMENDATION:
RFA subject to note 1. If approved, set hearing on next accounting review for 1/7/08.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02702

CASE NAME: MTR RE JUNE CASEY

SEE ALSO #42 & #42A

HEARING:
Petition for Appointment of Conservator

	COUNSEL:
JENNIFER WENGER	(CPE)...JEFFREY T. VANDERVEEN
JUNE CASEY	(CEP)...MARK J. A. FLORY
RICHARD SIMUN	(CPE)...JEFFREY T. VANDERVEEN

GENERAL INFORMATION:

THIS CASE IS SET FOR HEARING ON Petition for Appointment of Successor Conservator of the person and estate by husband of niece (Richard Simun)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Need to file notice of hearing and proof of service.
2. Need return of Citation as petitioner indicates proposed conservatee will not attend hearing.
3. Petitioner requests bond be fixed at \$21,200. It appears that the estimated value of the liquid assets is \$43,281.11. Thus, court may wish to fix bond at \$45,000. JTD
4. Petitioner requests medical and dementia powers with authority to administer dementia medications. Original medical capacity declaration dated 8/13/04 supported requests, but did not include support for dementia medications. Does court wish to require updated medical capacity declaration? JTD
5. Court Investigator report is filed with no adverse findings.
6. Need report of counsel (Attorney Mark Flory)

RECOMMENDATION:

Need to clear notes 1 & 2 and court's determination of notes 3 & 4. Need report of counsel. If approved, set hearing on accounting review for 1/7/08.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02702

CASE NAME: MTR RE JUNE CASEY

SEE ALSO 41 & 42A

HEARING:
Hearing re: STATUS

COUNSEL:
JENNIFER WENGER (CPE)...JEFFREY T. VANDERVEEN
JUNE CASEY (CEP)...MARK J. A. FLORY
RICHARD SIMUN (CPE)...JEFFREY T. VANDERVEEN

GENERAL INFORMATION:

At hearing on 8/31/06, the court is advised that Richard Simun had filed his petition for successor conservatorship and the court set this status review hearing.

THIS CASE IS SET FOR HEARING ON Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. None

RECOMMENDATION:
None

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02702

CASE NAME: MTR RE JUNE CASEY

SEE ALSO 41 & 42

HEARING:

SECOND AND FINAL Account and Report of JENNIFER WENGER and
Petition for allowance of fees filed.

COUNSEL:

JENNIFER WENGER	(CPE)...JEFFREY T. VANDERVEEN
JUNE CASEY	(CEP)...MARK J. A. FLORY
RICHARD SIMUN	(CPE)...JEFFREY T. VANDERVEEN

GENERAL INFORMATION:

Current conservator was removed on 5/25/06. A petition for successor conservator is also
before the court (matter 41)

Accounting covers period 7/31/05 – 4/21/06

Assets on hand: \$43,281.11 (all cash)

THIS CASE IS SET FOR HEARING ON 2nd & Final Account and Petition for Fees and for
discharge of conservator (Jennifer Wenger)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner requests fees of \$2,645.50, of which petitioner has received
\$2,700 in monthly periodic payments per court order of 1/9/06. Billed at
\$55/hour for 48.1 hours. Petitioner alleges that petitioner will re-pay the
conservatorship estate \$54.50 as overpayment of fees.
2. Attorney requests fees of \$1,168.75. Billed at \$275/hour for 3.25 hours.
Attorney also requests reimbursement of costs of \$2.34 for postage. This
cost is a non-reimbursable cost per local rule 1406(f) as these are
considered overhead.

3. Petitioner alleges that prior to the conservatorship, the conservatee sold her home and spent in excess of \$200,000 profit on scams perpetrated on her by individuals outside the United States. Petitioner is working with local law enforcement to recover these funds (which is unlikely). Petitioner has also worked with Internal Revenue Service to forgive a \$20,000 debt, as well as with other creditors to forgive debts, due to her situation. Does court wish to require copies of bank statements pre-conservatorship (i.e., months of 7/04 & 8/04) and/or copy of 2003/2004 tax return(s)? JTD

RECOMMENDATION:

RFA subject to court's confirmation of fees and determination of note 3. Once approved, set hearing for filing of receipts and final discharge for 11/7/07.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR
HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02847

CASE NAME: MTR RE CHERYL MCCOLLUM

HEARING:

FIRST Account and Report of INLAND COUNTIES REGIONAL CENTER INC
and Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CENTE(CE)...BRUNICK MCELHANEY & BECKETT
CHERYL MCCOLLUM (CTE)...

GENERAL INFORMATION:

Accounting covers period: 4/6/05 – 6/30/06

Assets on hand: \$18,268.05 (all cash)

THIS CASE IS SET FOR HEARING ON 1st Account Current and petition for allowance of fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner waives fees as conservator. Instead, petitioner requests approval of payment of trustee fees taken by Inland Counties Master Trust for services to the trust estate during this first accounting period in the amount of \$656.25 based upon \$218.75/quarter (services average about 2 hours per month for a total of 26 hours) together with a one time set up fee of \$150 already charged. JTD
2. Petitioner requests the court allow future trustee fees to Inland Counties Master Trust in the amount of \$218.75 per quarter, or \$875/year.
3. Attorney requests fees of \$1,085, but has agreed to a reduced fee of \$500. Billed at \$110-\$125/hour for attorney time and \$105/hour for paralegal time. Itemized. JTD
4. Petitioner requests all future accountings be waived per CRC 7.903(d) as the trust estate value is less than \$20,000. Petitioner alleges it is anticipated that the trust estate will continue to qualify for waiver of accountings at future dates. Court may wish to direct petitioner that if the trust estate for any reason exceeds \$20,000 that petitioner inform the court within 72 hours. JTD

RECOMMENDATION:

RFA subject to court's determination of fees and determination of future accounting waivers. If future accountings are not waived, set next accounting review for 1/7/08.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 10:32 DEPT: E1

CASE #: SC SS02858

CASE NAME: MTR OF DOUG A RANDALL

HEARING:

FIRST Account and Report of INLAND COUNTIES REGIONAL CTR and
Petition for allowance of fees filed.

COUNSEL:

INLAND COUNTIES REGIONAL CTR (CE)...BRUNICK MCELHANEY & BECKETT
DOUG A RANDALL (CTE)...DONNASUE SMITH-ORTIZ

GENERAL INFORMATION:

Accounting covers period: 5/27/05 – 5/31/06

Assets on hand: \$28,700.74 (of which \$28,306.01 is cash and the balance in value of
personal property items)

THIS CASE IS SET FOR HEARING ON 1st Account Current and Petition for Allowance of
Fees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Petitioner waives fees as conservator. Instead, petitioner requests approval of payment of trustee fees taken by Inland Counties Master Trust for services to the trust estate during this first accounting period in the amount of \$437.50 based upon \$218.75/quarter (services average about 2 hours per month for a total of 26 hours) together with a one time set up fee of \$150 already charged. JTD
2. Petitioner requests the court allow future trustee fees to Inland Counties Master Trust in the amount of \$218.75 per quarter, or \$875/year.
3. Attorney requests fees of \$1,172.50, but has agreed to a reduced fee of \$500. Billed at \$125/hour for attorney time and \$105/hour for paralegal time. Itemized. JTD

RECOMMENDATION: RFA subject to court's determination of fees. If approved, set next accounting review for 1/7/08. Accounting to be filed 30 days in advance.

San Bernardino Superior Court
CIVCAL4 San Bernardino District
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

DATE: 10/23/06 TIME: 1:30 DEPT: E1

CASE #: SPRSS06860

CASE NAME: MTR OF IRREVOCALE CHARITABLE REMAINDER TRUST

HEARING:

Motion re: TO COMPEL RESP TO FORM INTERROGATORIES filed by
Petitioner THOMAS PARTAIN, LINDA J PARTAIN

COUNSEL:

THOMAS PARTAIN (PET)...CHERYL THOMAS ATTORNER AT LAW
LINDA J PARTAIN (PET)...CHERYL THOMAS ATTORNER AT LAW
DAVID J. WEEMS (TEE)...DAVID
JEAN-PIERRE GALLELLI (GARRETT & TULLY)...GARRETT &
JPL PREMIER PROPERTIES, LLC (CARL BRUCE SHASKY)...CARL BRUC
PHOENIX FINANCIAL SERVICES, IN(CARL BRUCE SHASKY)...CARL
BRUC
JAMES (WOLFGANG FRANZ HAHN)...WOLFGANG
SNEDAKER DEVELOPMENT CO. INC (CARL BRUCE SHASKY)...CARL
BRUC
VENETO, LLC (CARL BRUCE SHASKY)...CARL BRUC

SEE CONFIDENTIAL MEMO IN FILE.